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Rajiv Nariani and Yath Ithayakumar, "Learning Mendeley Through Its Certification Program for Librarians" (2015). *Proceedings of the Charleston Library Conference*.  
<http://dx.doi.org/10.5703/1288284316299>

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# Learning Mendeley Through Its Certification Program for Librarians

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## Abstract

York University Libraries (YUL) ended its subscription to their default citation management program in the summer of 2015. The Mendeley Certification Program for Librarians was launched during that time and the science librarian at YUL completed this program. The steps undertaken during the completion of the program led to successful migration to the freely available, and libraries supported, citation management programs. This paper details the various initiatives that were done prior to and during the certification program and how completing the program has benefited our academic community. The certification program has helped solidify relations with faculty and students during the migration process and also provided the librarians opportunities for professional development. The emergence of similar certification programs with added benefits for the academic community may lead to better uptake of new collaborative research management tools.

## Introduction

Citation management programs have come to play an important part at York University Libraries (YUL). RefWorks has been the default citation management program at YUL since 2004. Up until 2014 we had over 48,000 RefWorks accounts registered in York's RefWorks system. In 2013, we had over 4,000 accounts created and by 2014 the number had dropped to 2,000 new registered accounts. This was because YUL was coming out of RefWorks. This program had served the faculty, students and staff at York University for the past eleven years. In 2014, YUL started promoting Mendeley and Zotero as the two freely available citation management programs. This paper details the steps involved in migrating to Mendeley and the completion of the Mendeley Certification Program by the science librarian during the summer of 2015.

This paper is divided into three parts:

- Reference management scenario at York University Libraries: prior to starting the certification program
- During the certification program: citation management survey
- Promoting Mendeley: post certification

## Prior to the Certification Program

Starting in 2013, York University, like many other Ontario Council of University Libraries (OCUL) institutions, realized that it could not keep up with the ever-increasing costs of subscription-based citation management programs. Besides, our academic community also wanted more features in a program including, easy use of the citation plugin, the ability to capture metadata from web pages and PDFs, the ability to make notes on PDFs and compatibility with Mac. Librarians from OCUL discussed and pursued trials to other citation management programs. As a result, different citation management programs were being taught and promoted at Ontario universities during that period.

In the meanwhile, some of York University science faculty had heard about Mendeley at various science conferences. They were impressed by the unique features in this new citation management program and invited the science librarian (and the author of this paper) to teach this program. Mendeley was integrated in all library workshop sessions for upper undergraduate and graduate students in 2013. In 2014 when YUL decided to come out of subscription-based citation management programs, students and faculty members were provided library support to

transfer their references from RefWorks to Mendeley or Zotero. The messages were posted periodically on the online university newsletter (YFile, 2014). The libraries also offered several bootcamps (Figure 1) for students and faculty to help with the migration process.

Attend a Migration Bootcamp	
<b>zotero</b> May 11, 12:30-2pm OR May 26, 10-11:30am Register <a href="http://goo.gl/9ltcyw">http://goo.gl/9ltcyw</a>	<b>MENDELEY</b> May 8, 10-11am OR May 19, 2-3pm Register <a href="http://goo.gl/Zlqro7">http://goo.gl/Zlqro7</a>

**Figure 1. Migration bootcamp.**

A citation management team, consisting of the associate university librarian (services), business librarian, science librarian, web librarian, bibliographic services manager, and the acting head of the library computing services, was also formed. Students and faculty could ask related questions about the migration process or request classes for Mendeley and Zotero. A dedicated e-mail account was set up to answer these questions, and members of the citation management team monitored this account.

### The Build-Up to the Mendeley Certification Program: Understanding Faculty and Students' Needs

The science librarian was a part of the citation management team, and this provided him an impetus to conduct a survey on citation management tools being used by the science and health science faculty and graduate students. Another objective was to know why a particular program was being used and what features were important to them. It was also another way to inform RefWorks users that the subscription to the program was ending and librarians could help with the migration to a new citation management program.

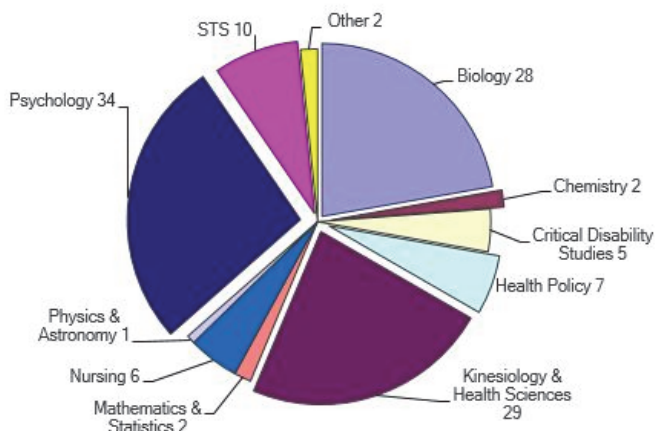
### Method

Two separate online surveys with a similar set of questions were created using Survey Monkey. Each of the surveys had five questions related to the use of citation management software and was sent to faculty members and graduate students in the sciences and health sciences in January 2015. The survey was kept open for three weeks. Initial questions were related to department affiliation and subsequent questions were about the usage of citation management programs and their pertinent features. Survey respondents had the ability to provide open-ended and question-specific comments. The whole survey took fewer than five minutes to complete. The survey link was e-mailed to a total of two hundred faculty members and four hundred graduate students.

### Results and Discussions

#### Who were they?

A total of fifty-nine faculty members and a hundred twenty-five graduate students (Figure 1) completed the survey. We had a higher number of faculty members from psychology ( $n = 19$ ) and kinesiology ( $n = 16$ ), followed by the physics and astronomy faculty ( $n = 6$ ) and chemistry faculty ( $n = 7$ ). A total of ten faculty members from nursing and health science policy and management also participated.



**Figure 2. Students from different disciplines.**

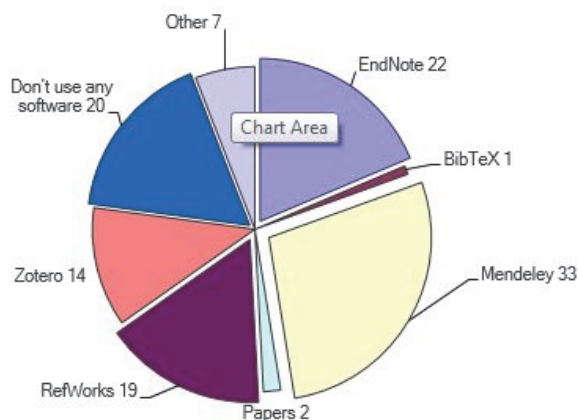
Similarly, we had a high number of graduate students from psychology ( $n = 34$ ), kinesiology

( $n = 29$ ), and biology ( $n = 28$ ), followed by science and technology studies, and nursing and health policy and management (Figure 2). The higher number in kinesiology and biology students could be because the author is the kinesiology and biology librarian. The psychology department is the largest department in the faculty of health at York University, and this could account for the higher number of psychology graduates completing the survey.

### Which citation management programs had faculty and students used, and which one was used most often?

Faculty members and students were asked if they were using any citation management programs. We wanted to know if they had tried more than one program and if there were features in some other programs that were used more often. We also wanted to know the primary citation management program being used by our respondents.

Out of the fifty-nine faculty responses, fourteen had tried two or more citation management programs, and of the hundred twenty-five students, twenty-eight had tried more than one citation management program. Around 13% ( $n = 8$ ) of the faculty and 17% ( $n = 20$ ) of the graduate students did not use any citation management programs (Figure 3). Of the twenty students who replied in negative, three had tried at least one citation management program in the past.



**Figure 3. The most often used citation management program (students' responses).**

The next question was about the citation management program used most often. Among the fifty-nine faculty members, we had the highest users for EndNote ( $n = 18$ ), followed by RefWorks ( $n = 9$ ) and Mendeley ( $n = 7$ ). Of the one hundred eighteen students who replied to this question, thirty-three were using Mendeley and twenty-two were EndNote users, followed by RefWorks ( $n = 19$ ) and Zotero ( $n = 14$ ). Other programs mentioned by students and faculty included WizFolio, JabRef, Papers, Procite, and PERRLA. We had six faculty members and three graduate students who used BibTeX for formatting their references. They were from physics and astronomy, mathematics, and psychology.

There are tricky issues in BibTeX, it would be great if a library resource person was knowledgeable about it for occasional support. For journal submissions it generally works without problems, but textbook chapters sometimes require special formats that it won't do easily. Sometimes free help from the web exists, sometimes not.

### Faculty Comment

Our faculty members have been EndNote users for a long time. Many of them have purchased a personal subscription and have created groups and loaded papers in it. They have expressed some apprehension about migrating all the references, documents, and groups from EndNote to a different citation management program.

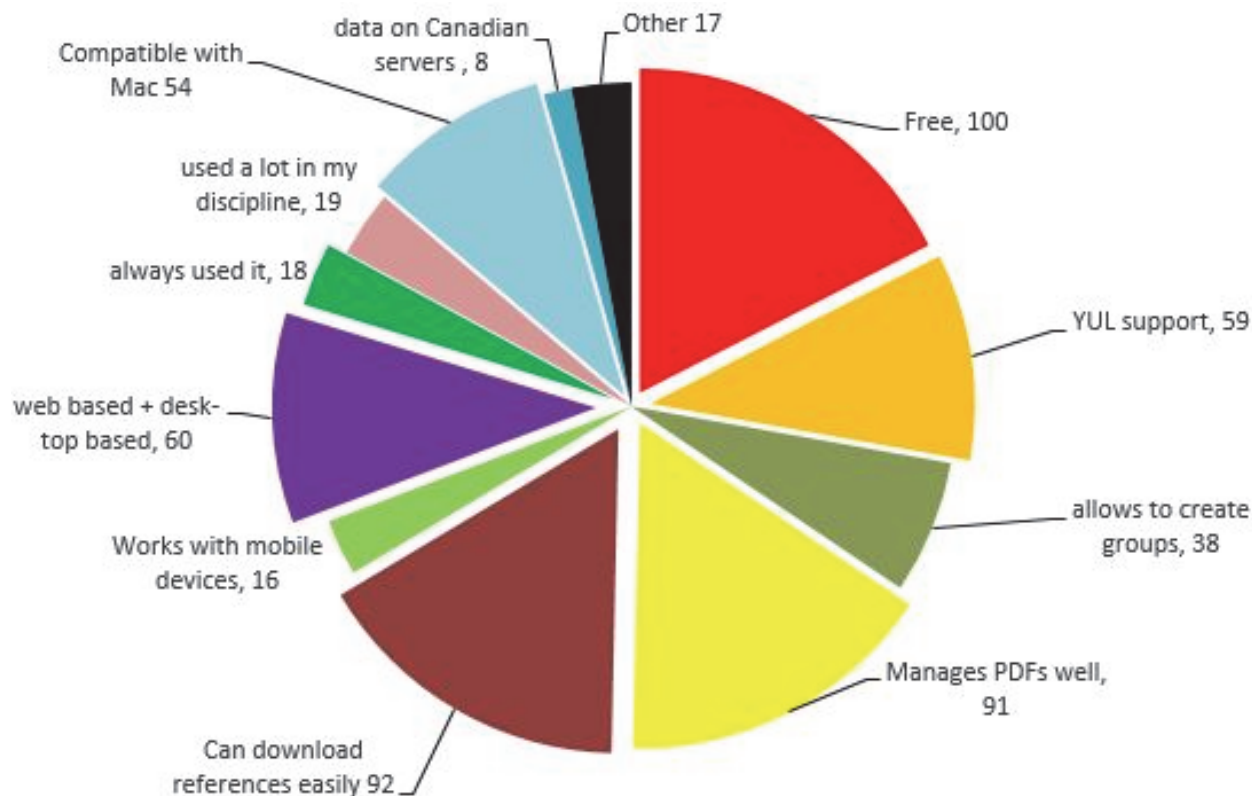
I need help to save my massive endnote 7 libraries and be able to move it to newer computer when I get them.

If you do migrate to another system, please choose one where it will be straightforward to transfer our lab's 1000's of references (with subfolders) over to the new system. Thanks!

### Faculty comments

### Which features were important to them?

One of the objectives of this survey was to know the important features in a citation management program. The top features for our students were



**Figure 4. Features important in a citation management program (student responses).**

that the citation management program be available free of cost (83%) and should work seamlessly with different databases (76%), handle PDFs well (75%), and be supported by the Libraries (Figure 4). Faculty also valued the ability to easily download references from different databases into the citation management program (80%), and more than half of the respondents wanted the program to extract metadata from the PDFs efficiently and wanted it to be freely available. Other features that scored high with both groups were that the program should have web-based and desktop components and that it was compatible with Macs. Our previous citation management program did not work well with Macintosh. It provided the ability to upload PDFs but could not extract metadata from the PDFs.

Very few survey respondents were concerned if their citation data was not stored on Canadian servers. Also, some faculty members preferred a citation management program because they had always been using one (38%), while some others

preferred a particular program because it was used a lot in their areas of study (17%).

The decision to change to a new citation management program was not without challenges for our students, faculty, and librarians. Some of our users had created customized citation styles in Refworks, which needed to be redone in Mendeley. Similarly, the transfer of references, documents and folders, and private groups and PDFs contained in them was a time-consuming process.

RefWorks was also supported by my old institution and changing over to a new one just seems like too much of a hassle.

Faculty comment

During the migration process a few science faculty members had contacted the librarian to help with the migration of references collected by their lab members. On the positive side, the migration to a new program introduced our faculty and students

to new features, which has been appreciated. They found that the newer citation management programs offer a cleaner and a simpler interface. They liked the ability to drag and drop PDFs to their Mendeley library.

Being able to easily import the reference from online databases is key, and Mendeley has a pretty good feature where it can automatically scrape information from an imported pdf file.

Thanks Rajiv—o far I really like Mendeley.

BIG thanks! I was paying \$[X.xx]/month to collaborate with the lab. Much appreciated!

#### Faculty comments

Upper undergraduate students are also using Mendeley for sharing their research work. They meet up with their liaison librarian and have set up shared groups, and the search strategies and important documents are populated in the shared folder.

My favourite parts of Mendeley is [*sic*] the ability to add notes, highlights, and folders, as well as create a bibliography automatically on Microsoft Word.

#### Graduate student comment

During the certification program, the science librarian had the opportunity to invite Mendeley representatives in March and again in May 2015. The science librarian and Mendeley representatives covered some of the new features in the Scopus database and Mendeley. Both events had significant student and faculty attendance, and Mendeley had graciously sponsored refreshments at both occasions. The author also collaborated with Mendeley representatives to present a poster at the Special Libraries Association Annual Conference (Green et al., 2015). The poster showcased Mendeley usage

statistics from six North American universities including York University. The various activities done to teach and promote Mendeley formed a part of the documents submitted for the Mendeley Certification Program. Completing all the assessment modules took fewer than five hours, but the time required for promoting and teaching Mendeley was considerably higher. In total, around forty hours were spent on creating and updating the LibGuide, including Mendeley teaching and promotion activities.

The Mendeley Library Guide (Nariani, 2015) has become a ready reference for our users and is used heavily in the library workshops. In 2015 alone it has had over 4,500 hits. The guide has detailed screenshots on installing the Word plugin and creating a bibliography in MS Word. It outlines the steps to transfer documents and citations to Mendeley from different databases. After completing the certification program, the science librarian has fielded a variety of Mendeley-related questions. The common questions asked by our faculty and students were later posted on the Mendeley LibGuide.

### **Certification and Ahead: Bringing in the New**

One of the main benefits of completing the certification program meant that we could distribute one thousand Mendeley Premium accounts to our academic community. The Premium account came with increased storage and the ability to form more private groups. In the third part of the assessment process, the science librarian had detailed how these premium accounts would be distributed. The Mendeley upgrade link was sent to faculty and graduate students through the faculty of health and faculty of science list-servs and as personal e-mails. Incoming students were informed about Mendeley and its features at graduate student orientations in September 2015.





**Figure 5. Disturbing freebies and the Mendeley Premium account.**

We have organized many classes on Mendeley for undergraduate students and have also distributed the free gifts and premium accounts to upper undergraduate students. The free gifts (except the iPad, which belongs to the author) and the Mendeley Premium account link were also shared at orientation sessions and course workshops (Figure 5).

I use Mendeley and I find that it is very easy to use. I really appreciate that York offers workshops on how to use it as well. Another great feature is that it uses the document pdfs so I can highlight directly on Mendeley.

Graduate student comment

A *Mendeley: York University* public group has been created, and important Mendeley links and tips are posted on this group. Mendeley (Elsevier) had sent the details about this group to all users registered with the institutional e-mail address. After the certification, the author also delivered a BrightTALK webinar along with two other librarians from Helsinki University in August 2015 (Nariani, 2015). A Mendeley representative provided valuable support in terms of organizing this webinar. The different ways of promoting Mendeley at our institutions and the work involved during the Mendeley Certification program was discussed. The webinar was

attended by over 160 participants and was recorded for those who had missed the live session.

## Conclusion

The Mendeley Certification Program has allowed York University's science librarians to teach and promote this research tool more effectively. The survey provided excellent know-how about the features in a citation management program valued by our faculty and students. The certification program also provided a springboard to promote a new citation management program during a time of change at York University Libraries. The free premium Mendeley accounts served to assuage faculty and student concerns about the migration process. It also helped the librarian participate in various professional development activities while helping students, faculty, and the wider community engage in scholarly communication.

Academic librarians need to participate in similar vendor-based certification programs, which allow them to grow professionally and provide benefits to their academic community. Publishers at their end need to offer free premium products and upgrades that can be used by our scholars. It is necessary to have regular refresher courses to keep abreast of the new developments. The Mendeley team had recently sent information about the refresher webinars and quizzes which need to be completed in order to maintain the Premium accounts.

At YUL we were anticipating upset patrons with the decision to come out of subscribed citation management programs. Having a citation management team ready much before the actual migration was essential for a smooth transition. The Mendeley certification program along with the premium benefits and innovative features led to an increased uptake of the citation management program at York University Libraries.

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